REVIEWING A SF 278 REPORT

This guide covers the basic steps for viewing and reviewing a SF 278 report in FDM.

Compare/Reconcile Against a Previously Filed Report

It is recommended any time you review a SF 278 report that you compare and reconcile the current SF 278 report against any previous SF 278 report.
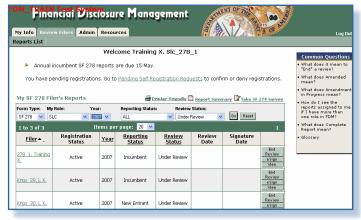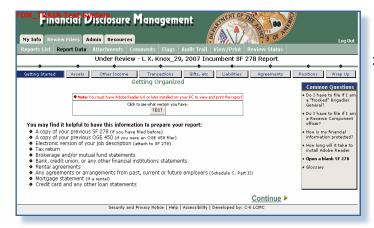
Selecting a SF 278 Report to Review

1. On the Review Filer's page, select any combination of the following and click **Go**
   a. Form Type, SF 278
   b. Reviewer Role
   c. Reporting and Review Status

Depending upon the filtering criteria you select, all reports that have been signed and submitted by your assigned filers are displayed.

At this point, you can opt to End Review, eSign or View.
   - Use End Review to signify that you have completed your review of a financial disclosure report.
   - Use eSign when you have completed your review and are confident there are no conflicts of interest.
   - View allows you to review the financial disclosure report online.

2. Click **View** beside the appropriate report. The Getting Organized page is displayed for the SF 278 report you are reviewing.

Reviewing a Report

In FDM, you can review report information by either navigating through the Report Data sections or by viewing/ printing the report form. When reviewing the report form, you must return to the appropriate Report Data section to include any line item comments.
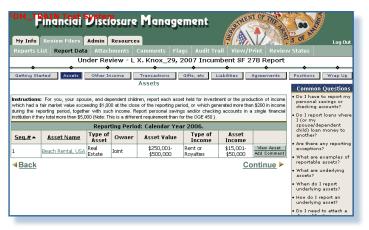
Reviewing the Report's Flags

Review any report flags to be sure all errors and omissions are addressed.

A red flag indicates required information is missing and that it should be provided before the report can be submitted. A yellow flag indicates that information is missing but is not required in order to submit your report.

3.   Click **Flags.**

4.   Review the report's flags. When complete, click either **Report Data** to return to the details of the SF 278 you are reviewing or **View/Print** to view and print the financial disclosure report form.

Report Data

5.   Select the appropriate report data sections and make any necessary comments.
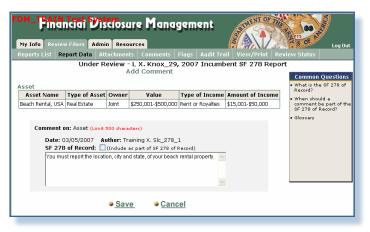
Comments

Comments can be added to specific line items or to the SF 278 report overall as substantive or non-substantive comments. A comment should be included as part of the SF 278 of record, if it is a substantive comment that provides additional information, a clarification, or a correction that materially affects the data reported on the SF 278.

Only the Supervisor and Senior Legal Counsel can designate that a comment is included in the SF 278 of record.
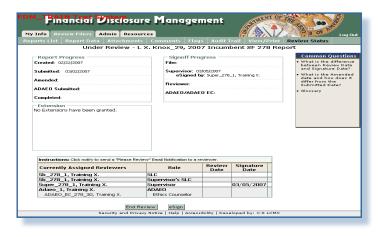
6.   Click **Add Comment** beside the appropriate line item.

7.   Review any existing reviewer or filer comments.

Note: Only select, **Include as part of the SF 278 of Record** if you want to include this comment publicly with the financial disclosure report.

8.   Type your comment and click **Save.**

Wrap Up

9. When you have completed your review, click **Wrap Up**.

10. Click **Continue**.

eSigning a SF 278

11. On the Review Status page, click **eSign** at the bottom of the page. A security message displays asking if you wish to proceed to the digital signature page.

12. Click **OK.**

13. Click **eSign**. Your report has been submitted.

An e-mail message is sent to the next set of reviewers indicating that the report is awaiting their review.

Ending the Review

A reviewer can End Review to signify that they have completed their review of a financial disclosure report. Ending a review is not the same as eSigning a report in that it does not sign the report.

14. On the Review Status page, click **End Review**. A message displays indicating that if the filer amends this report your set review date will be invalid.

15. Click **OK** to continue. The Review Status page is displayed.

For additional instructions on reviewing a SF 278 report, click **View/Print** and then select SF 278 Instructions.

Viewing and Printing a Report

At any time, you can view and print a financial disclosure report.

1. Click **View** beside the appropriate report on the Review Filers | Reports List page.

2. Click **View/Print** and then click **View/Print** again. The financial disclosure report displays in a separate browser window.

Printing a Report

3. Select **File | Print** and then click **Print**

Reviewing an Amended SF 278

You must digitally sign the SF 278 report again when a filer amends a financial disclosure report in FDM.

1. On the Review Filer's page, select any combination of the following:
    a. Form Type, SF 278
    b. Reviewer Role
    c. Reporting and Review Status

2. Click **Go**.

You will notice the Review Date for the SF 278 report you previously reviewed is crossed out. This indicates that the report was amended and needs to be reviewed once again.

3. Click **View** beside the appropriate report. The Getting Organized page is displayed for the SF 278 report you are reviewing.

Audit Trail

Review the Report's Events to verify if your recommended changes where made by the Filer.

4. Click **Audit Trail**. The Audit Trail page displays.

Reviewing a Report's Events

5. Review the Report's Events to verify if your recommended changes where made.

6. Click **View Event** to view an event's details.

Reviewer's Wrap-Up

7. Click **Report Data** and then **Wrap Up**. The Reviewer's Wrap Up page is displayed.

8. Click **Continue**. The Review Status page is displayed.

9. Review the report and signoff progress.

At this point, you can opt to End Review or eSign the report.

10. **eSign** the report.

11. Click **Report List** to continue reviewing financial disclosure reports in FDM.